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ABSTRACT

In a study on public television viewing, data taken from KQED San Francisco (California) revealed that the pattern of "cume build-up" and viewing to program genres was absolutely similar in non-pledge and pledge months. The percentage of audience that watched 7 or more other pledge programs was well over 50% for many of the shows. These new findings should change the way public television approaches its audience in fundraising efforts. Research indicated that certain dissimilar programs contained something that appealed to the same individuals. The more that is known about programs that share that appeal--programs that have affinity--the more opportunity there is to: "(1) manipulate the schedule in ways which increase audience flow; (2) cross-promote programs that people are likely to watch; (3) develop effective, on-target pitches and strategies for pledge drives; and (4) demonstrate increased daypart frequency for underwriting sales." With access to home-by-home viewing data, viewing patterns can now be exposed that show affinity relationships between programs and program genres. Understanding affinity will allow for more precise scheduling of public television programs than was possible with audience flow studies and scheduling programs by demographic appeal. Research also indicates that certain regions of the country vary in preference for certain types of public television programming. A sidebar provides a fictional illustration of the importance of affinity studies. (Author/AEF)

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ED 394 524

Affinity: Implications for Scheduling and Pledge

by Judith LeRoy and David LeRoy

The Tampa Study, originated by two Tampa public TV stations using hitherto unavailable audience data, has uncovered some amazing facts. We have reported some of those facts in *info.p@ckets* nos. 13 and 16.

The stations, along with TRAC Media Services, acquired Nielsen data for viewers who watched either or both public stations during the course of a month. Because the viewing in each household was available for a whole month, and because we weren't forced to think in terms of "averages" but rather by individual records, we got an entirely new slant on how people watch public TV. A particularly intriguing finding involved viewing patterns: we learned that things *weren't* the way we public TV researchers always assumed they were.

For one thing, our previously available Nielsen sweep data led everyone to believe that people don't watch much public TV—that the typical viewer watches just a couple of times a month, and that we lack the "core" audience so obvious in public radio. The remarkable data from this new study (which have been replicated in other markets) show that 60 percent of the households in the market view just about *every* week. Forty-eight percent of the households in Tampa viewed 14 days or more in a month and *21 percent watched 21 or more days!* A nice surprise!!

And remember when we all thought that people came to public TV for one or two favorite genres of programming during a month and generally ignored the rest? We believed that public TV audiences were made up of tiny slivers, each watching a different kind of fare. Wrong again. Only *10 percent* of the homes in the Tampa market only watched one genre. In this market, with two public TV signals, most households viewed an average of *four* genres on one of the signals PLUS *three* genres *on the other channel!* And 18 percent of the households watched *10 of the possible 12 genres* over the course of a month. Public TV *does* have a core audience. We just haven't been able to find it because we didn't have the tools to do so.

Thanks to a grant from the Corporation for Public Broadcasting, the research began in the Tampa Study was continued and extended to other markets to discover whether the findings would replicate. They did. What's more, in the second stage of the research, the Home-By-Home Viewing Study, we extended our

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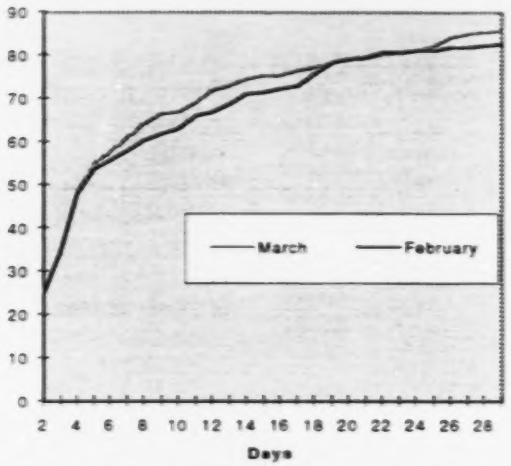
household viewing analyses through *two* months—February and March—to see if things changed during pledge months.

They didn't. The pattern of cume build-up and viewing to program genres was absolutely similar in non-pledge and pledge months. Here's the graph comparing build up cumes in San

KQED's Build Up Cumes



Francisco in February and March. There was hardly any difference between sweep and pledge months in the pattern of cume development.

In fact, the only difference worth noting was that viewing frequency declined 10-15 percent during March, with households sampling at exactly the same rate but viewing somewhat less during pledge periods. However, people watched just as many different program types.

The pledge data confirmed an earlier insight we gained while studying build-up cumes during pledge periods in Washington DC, Philadelphia, and Phoenix several years ago. In those studies, we looked at viewership during *pledge breaks*—not during the programs surrounding the breaks. We (and the rest of the public TV community) were more than mildly surprised to discover the *large* number of pledge breaks viewers tuned in. Even though folks may tell you that they "never view pledge breaks" many of them have watched dozens over the course of a pledge drive. So we shouldn't have been surprised by the new data we received in the Home-by-Home Viewing Study. But we were.

We were, in fact, absolutely astounded to see the percentage of audience for many of the programs that watched *seven or more* other pledge programs. The following data was taken from KQED San Francisco. It names the program, lists the percentage of its audience that 1) watched one to three *other* pledge shows; 2) watched four to six others; and 3) watched seven or more.

This list presents a sampling of the data. Among all the programs on KQED in March, the program with the highest percentage watching one to three programs and the smallest percentage watching less than seven was *Bill Nye*, where 31 percent of the audience watched one to three other pledge programs and 31

Program	*% watching 1-3 others*	*%watching 4-6 others*	*%watching 7 or more*
All Creatures	**10%**	**17%**	**72%**
American Experience	**7**	**26**	**67**
American Cinema	**8**	**31**	**61**
Are You Being Served?	**16**	**33**	**51**
Bill Nye Science Guy	**31**	**38**	**31**
Barney	**35**	**35**	**31**
Fighter Pilot	**0**	**23**	**77**
Hermitage	**3**	**16**	**81**
Kitaro	**0**	**9**	**91**
MacNeil/Lehrer	**12**	**40**	**48**
Masterpiece Theatre	**0**	**12**	**88**
Mystery	**5**	**20**	**75**
Over America	**4**	**18**	**78**
Puzzle Place	**30**	**38**	**72**
Placido Domingo	**0**	**10**	**90**
Red Green	**0**	**30**	**70**
Sister Wendy	**2**	**9**	**89**
Sesame Street	**26**	**39**	**35**
This Old House	**2**	**42**	**55**
Today's Gourmet	**15**	**50**	**36**
Wall Street Week	**0**	**18**	**82**
Washington Week in Review	**4**	**24**	**72**

percent watched more than seven. Even this "worst case" is better than we ever imagined. These numbers are, in fact, staggering.

It really changes your perspective to know that 90 percent of the audience for *Remember When* has or will watch seven or more other pledge programs in the current drive, doesn't it? When you talk to this audience during pledge breaks, treating them like they really don't know much about public TV or pledge, you really are far off base.

An interesting facet of this research shows that the two program genres least likely to extensively view the rest of the pledge schedule are children's programs and cooking shows.

Selected programs for KQED, March 1995	
Percentage of Audience	
Viewing 7+ Pledge Programs	
Kids Series Average	32
Cooking Show Average	38
MacNeil/Lehrer	48
Eagles	50
This Old House	55
Frontline	60
NOVA	62
Nature's Symphony	68
Nat King Cole	69
Around World 80 Days	72
Glenn Miller	73
Mind Body Soul	75
Fighter Pilot	77
Over America	78
Hermitage	81
Wall Street Week	82
Masterpiece Theatre	88
Placido Domingo	90

Neither finding, perhaps, is particularly surprising, considering the younger demographics for both these genres. But it is necessary to remind oneself that the majority of these viewers view more than three other pledge programs. Recall that 85 percent of the households who view children's programs, return to their public TV station during prime time as well. Ditto for cooking shows.

So the first rule is: there are very few innocents out there listening to a pledge pitch for the first time. This fact alone should change the way we talk to the audience. A local development director would be gratified to point a finger at the audience and say:

> "We know that many of you out there enjoying *Mystery* tonight were with us during *NOVA* on Tuesday as well. And you also will probably be with us on Saturday to watch *This Old House* and *The Frugal Gourmet*. Your children enjoyed Big Bird on *Sesame Street* this week and they watched *Big Feats* on Thursday. Think of all the enjoyment we have brought to you... the learning experiences, the adventures, the information. What can you do for us, now???"

Will this ever be possible? Is there rhyme or reason to the combinations of programs that households choose to view? Would sophisticated computer analysis determine patterns of viewing among households that could help us schedule and fundraise in more effective ways?

The answer? Yes.

While the research is still in an early phase, it seems clear that there are coherent patterns of co-viewing of programs. The search has just begun into an area that we call "program affinity."

What Is Program Affinity?

It comes as no surprise to anyone that viewers who watch *The MacNeil/Lehrer NewsHour* might also appear in the audience for *Washington Week in Review*. There is an obvious topical similarity between the programs as well as likenesses in content, format and audience demographic appeal.

But when we find that many *This Old House* viewers are also found in the audience for *Mystery*, the issue becomes more complex. The programs have different appeals, different content, different pacing. They're just plain different kinds of programs. But something resides in those dissimilar programs that appeals to the same individuals. These programs have a "certain something" that appeals to the same people. When a group of people share a liking for a variety of dissimilar programs we have, de facto, affinity audiences.

The more we know about programs that share "that certain something"—programs that have affinity—the more opportunity we have to 1) manipulate the schedule in ways which increase audience flow, 2) cross-promote programs that people are likely to watch, 3) develop effective, on-target pitches and strategies for pledge drives, and 4) demonstrate increased daypart frequency for underwriting sales.

But acquiring data about program affinity isn't easy. Because of the format in which audience data comes to us from Nielsen, it's almost impossible to see the combinations of programs that individual persons or households view. While we know how many households view a certain program, we have no idea whether any of the households have watched other programs on the station.

But the new data allow us to watch household viewing, hour by hour, day by day. These data expose viewing patterns that show affinity relationships between programs and program genres. While this research is new, it suggests that there is a much better way of programming public TV stations than we ever before imagined—a way of finding an excitingly varied, appeal-congruent schedule that will promote audience flow and increase frequency, thereby increasing viewer loyalty and membership.

Let's talk about affinity. Actually, let's illustrate affinity, broadly interpreting some of the emerging data. Picture the audience for two different programs. Take for example, *Frontline* and *Nova*.

One Tuesday night in a midwestern city, the audience for *NOVA* at 7PM is a four rating—4,000 households. The *Frontline* rating at 8 PM is a two—2,000 households. The number of households that watched both programs? Two hundred. How do we know that? The affinity software gives us the number.

Now, another example. This time we're looking at two different programs: *This Old House* and *Wild America*.

This Old House, played Saturday morning at 11 AM, gets a three rating—3,000 households. *Wild America*, telecast at 5 PM Saturday, also gets a three rating—3,000 households. The computer tells us that 900 households watched both programs.

Clearly, in this example, there are more viewers in common for *This Old House* and *Wild America* than there are for *NOVA* and *Frontline*. That, in a nutshell, is affinity...shared audience.

Audience Flow Versus Affinity

Before we got access to home-by-home viewing data, the closest we had come to uncovering affinity between two programs was in audience flow studies. The comparison of audiences from two programs that are scheduled consecutively has a long history. From these flow studies we have learned much about audience turnover—which is the converse of affinity. When *Masterpiece Theatre* follows *Nature*, but only 15 percent of the audience stays tuned, we have audience turnover. This suggests there is little affinity between the two programs. Not surprisingly, perhaps, the highest amount of flow found in the prime time schedule is between *Washington Week in Review* and *Wall Street Week*. One assumes this means there is affinity between programs, and in this case, there probably is. But there are other junctures in the

schedule where the audience seems to flow somewhat between programs—say, 25 percent of the audience for *Frugal Gourmet* is present in the audience for *Wild America* which follows *The Frugal Gourmet* in a station's Saturday schedule. Is this flow or simply an absence of turnover—an accident of programming? With new tools to discover true affinity between programs, we won't jump to hasty conclusions about shared audience appeal between programs.

Demographic Appeal Versus Affinity

We have, in the past, counseled clients to schedule programs with demographic appeal consecutively in certain parts of the schedule in order to maintain audience flow, viewing frequency, and to cultivate audience loyalty. Using this theory, one might schedule two programs appealing to 35-49 year old males consecutively, hoping to carry a portion of the audience through a second hour of public TV programming. But it doesn't take a genius to realize that the viewing fare that attracts one 65-year-old woman isn't necessarily the same as that which attracts another. The viewer of *Lawrence Welk* isn't usually the same individual who regularly watches *MacNeil/Lehrer* or *Masterpiece Theatre*.

Understanding affinity will allow us to schedule programs with more precision and understanding not because "if your mother wants to watch this program, so does mine."

Overlap or Affinity

There is an issue we must examine to understand affinity. Here is the issue in a nutshell: Many viewers in the *Masterpiece Theatre* audience flow *from Nature*, which precedes it in most stations' schedules. However, in some markets as much as 85 percent of the *Nature* audience does *not* flow into *Masterpiece Theatre*. Thus, while there is some *overlap* of the *Masterpiece Theatre* audience from *Nature*, there is not much audience *affinity* between the two series.

In short, affinity must be mutual. To have affinity between two programs, attraction must flow both ways. The audience must travel back and forth between programs—*Masterpiece Theatre* must have as much appeal for the *Nature* audience as vice versa!

We suspect that affect or positive liking for a program is what drives affinity. It is the difference between you and I liking the same four programs and seeking them out, versus we just happened to be in the audience for *MacNeil/Lehrer* or *Are You Being Served?* It's the difference between "It's an all right show and I watch it sometimes" and "I really like that show and watch it whenever I can."

Audience Attractors Versus Audience Accidents

This research shows that some programs are more important than others. These programs attract a large number of viewers and these viewers, in turn, fan out through the rest of the schedule. Just as a bright light plunged into a dark sea will attract thousands of fish, certain public TV programs attract large pools of viewers from almost nowhere, while others beam away to almost no one. These key programs, then, share audience with many other programs in a station's schedule. They have high affinity with many other programs in the schedule.

It goes without saying, just as regions of the country vary in tastes for food or music, so do they vary in preference for certain types of public TV programming. New York differs from San Antonio, which differs from San Francisco. Attractor series will have some universality, but there are also local influences. *Mystery* gets a seven rating in San Francisco and its audience moves freely among other programs in the schedule. *Mystery* is an attractor series in San Francisco. In Boston, *Mystery* gets a two or three rating and has a more discrete audience than in San Francisco—not as many shared viewers. In Boston, *Mystery* is not an attractor series.

We are currently analyzing individual household viewing records in a number of markets. While the work is still in progress—and will demand resources and attention from all of us in the next several years—exciting, previously unsuspected insights emerge daily. The information that comes from affinity studies will be practical, pragmatic and dramatic. And it will affect all of us who work in public TV in the years to come.

Below is a bit of science fiction that should illustrate the utility of the concept and the research that will provide the insights, connections, suggestions and conclusions for us all.

You can see why the concept of affinity excites us. It has applicability from one end of public TV to the other. The information will have great practicality. It makes sense.

What's Next?

More work. The data is expensive, the analysis is time consuming. But it must proceed. Public TV has held its own through many stress-filled years. We have successfully withstood the threat of cable. As the networks dropped ratings and share, public TV maintained its audiences despite the increasingly strong competition. We are struggling with budget cuts and political conflagration, and we're keeping our heads above water. But the future isn't getting easier. The 500 channel world, the high speed of travel on the information highway, and continuing onslaughts from the media world and from without mean we can't relax.

But we have a dedicated audience. Studies such as this one show it. Our viewer's lips and pens prove it when they speak and write to their

Once Upon a Time . . . Affinity in Somewhere, PA

In the May sweep, two distinctive programs—*This Old House* and *Trout Fishing, USA*—were telecast on KPUB-TV in Somewhere, Pennsylvania. *This Old House* is a Thursday, prime time program for the adventurous KPUB, and the station played *Trout Fishing, USA* at 5 PM on Saturday. *This Old House* got a six rating—6,000 households. *Trout* got a two rating—2,000 households. As we examine the audiences on our data base—Eureka!—we find 1,000 of the *House* households also watched *Trout*. Since they were not consecutively scheduled, there was no chance for accidental "flow" from one program to another. But 1,000 households sought out and viewed both programs. Simply put, some element of those programs attracted and held the same viewers. Interestingly enough, the May data revealed that these same 1,000 viewers also tuned in for a Friday night local program, *Discover Somewhere*, which also got a two rating in the May Nielsen book. Now we can begin to make some affinity assumptions that are actionable.

For the July sweep, the astute program manager, Iam A. Skedular—recognizing the affinity between the three programs—went into action. He moved *Trout* after *House*. He cross-promoted *Discover* at each break—before, between and after *House* and *Trout*.

The July book arrived. 'Lo and behold, *This Old House* maintained it's solid six rating, but *Trout Fishing, USA*, capitalizing on the flow, increased to a four. This time, 3,000 of the *House* households also viewed *Trout*. (The proximity in the schedule allowed more of the *House* viewers to flow into *Trout*, doubling the size of the audience and increasing the number of households which were available to watch both programs.) And the promotion for *Discover* Somewhere also worked. The rating for *Somewhere* increased to a 3, and 1800 of those viewers had also watched *House* and *Trout*, where they had caught the promotion that alerted them to turn on the set Friday night for a program they would surely enjoy.

Knowledge of viewing patterns helped KPUB build frequency... GRPs. The cume was not affected—and wouldn't be until a local TV critic, noting the audience growth and local interest of the programs and strategy, wrote about the programs and the station in the local paper, thus encouraging 100 hitherto un-PTV types to sample the

program in November (increasing the cume in November). Fifty of them came back for further programs on KPUB and viewed all three programs in February (increasing frequency in February).

But affinity applications don't end here.

The membership folks were about to drop an additional gift mailing. Communicating his exciting research findings, Iam encouraged the direct mail folks to do some research also. He asked them to locate the members who had pledged during *House* and *Trout* (this small station has a better-than-average computer system!). They wrote copy that talked of the excitement of doing things outdoors, making things, the joy of exploring one's environment and how KPUB helped them live fully, personally and comfortably and why these particular viewers should support the station. The return on these 100 letters was 20 percent—one heckuva lot better than the "average" return on the rest of the additional gift drop—a typical 5 percent.

Iam then went to the underwriting department. He showed them the ratings for Thursday night. He pointed out the favorable demographics in the Nielsen book. Then he used his ultimate weapon —information about the affinity between the programs. He pointed out that the lucky underwriters for *House* and *Trout* would get more than their money's worth in terms of gross impressions and, more importantly, average frequency. The station salesperson carried the message; the underwriters bought into the idea —at an increased fee. What's more, one of the underwriters—being a canny and shrewd advertiser—also bought a spot (at a premium price) around *Discover* on Friday night as well. And he became the charter underwriter of the station's new Affinity Campaign—"*Discover Somewhere!*"

The development director, seeing the audience ratings and demographics and recognizing the importance of affinity between *House* and *Trout*, actually left them in the pledge schedule one Tuesday night in August. And—flying in the face of the "flow versus churn" pledge argument— she moved *Discover* behind *Trout* that week, for a triple-threat occasion. A pledge stunt! And they pitched all the program cassettes together as a package for big bucks!!

Then she wrote a script for the evening's pitchers that not only specifically addressed the viewers as 35-49 males, but told those 35-49 males that she knew they watched other programs on KPUB, mentioning *House*, *Trout*, and *Discover* by name. She applied a bit of gentle pressure that "frequent users should be regular givers." Then, because she knew they were boomers, she had a desirable premium to encourage the transaction and told the viewers what these programs did for their lives, personally and uniquely. She made sure that the talent for the night was nimble, could speak young boomer male talk, and dressed and talked relaxed and cool.

Amazing. She had a $12,000 night—no mean feat for Somewhere, PA. And since this demo doesn't resist credit card giving (as some older ones do), she had the money in the bank before the night was over.

Congressmen, critics and friends in our behalf; their minds and hearts demonstrate it when they call to pledge dollars during our fund drives.

If we make it easy for viewers and members to find programs they value and appreciate, we have every reason to expect they'll watch us more and support us better. Affinity is a tool we can use to ensure that our viewers see the best of us. And this, in turn, will encourage and permit them to do the best for us in the complex, change-laden years to come.

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